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# The State of Utah's Travel and Tourism Industry 2023



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**POLICY INSTITUTE**

THE UNIVERSITY OF UTAH

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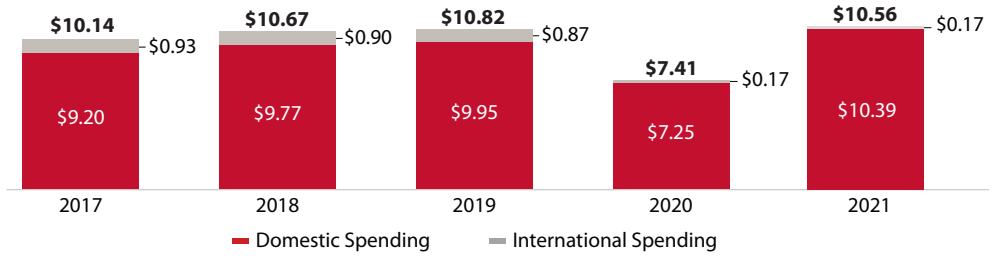


# Visitors and Spending

Visitors spent a record \$10.56 billion in Utah's economy in 2021, generating 130,600 total jobs and a record \$1.81 billion in total state and local tax revenue. Utah ski resort visitation (5.8 million) was at an all-time high during the 2021-2022 season, while 2022 national park visitation (10.5 million) was down an estimated 6.7% from 2021. Park visitation softening in 2022 was due to a variety of economic and geopolitical forces, including high gas prices, a strong U.S. Dollar, and the war in Ukraine. Overall, Utah's travel and tourism spending, air travel, ski and park visitation, and tax revenue have returned to—if not surpassed—baseline 2019 levels. Despite the sector's general recovery, however, international visitation has yet to rebound and leisure and hospitality employment continues to lag below visitor spending, exerting pressure on Utah's service-related businesses.

## Direct Visitor Spending, 2017–2021

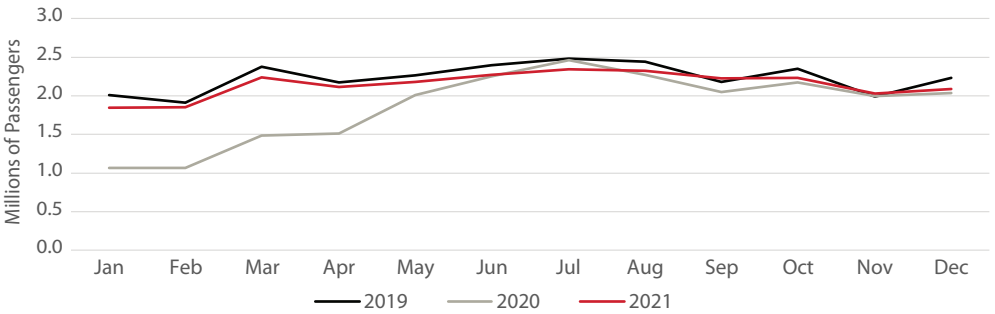
(Billions of 2021 dollars)



Note: Includes resident, domestic nonresident, and international visitor spending.

Source: Kem C. Gardner Policy Institute analysis of Tourism Economics data

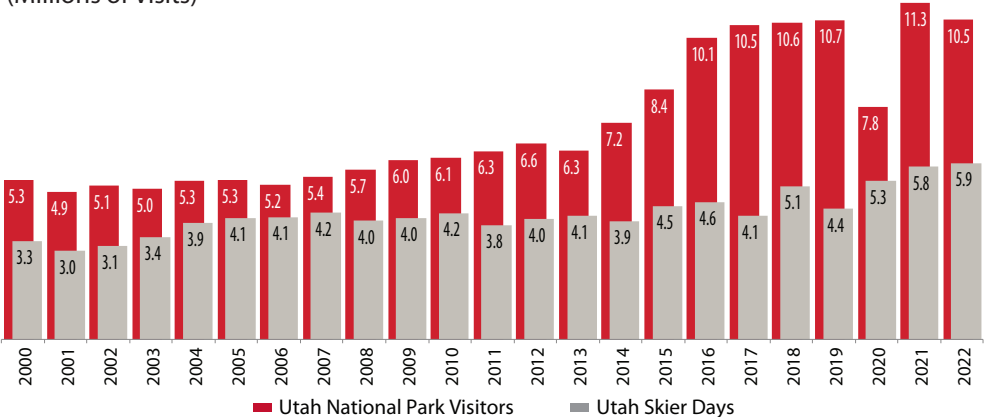
## SLC International Airport, Total Passengers, 2021 and 2022 vs. 2019 Baseline



Source: Kem C. Gardner Policy Institute analysis of Salt Lake City International Airport data

## Annual Change in Utah State and National Park Visitation, 2000–2022e

(Millions of Visits)

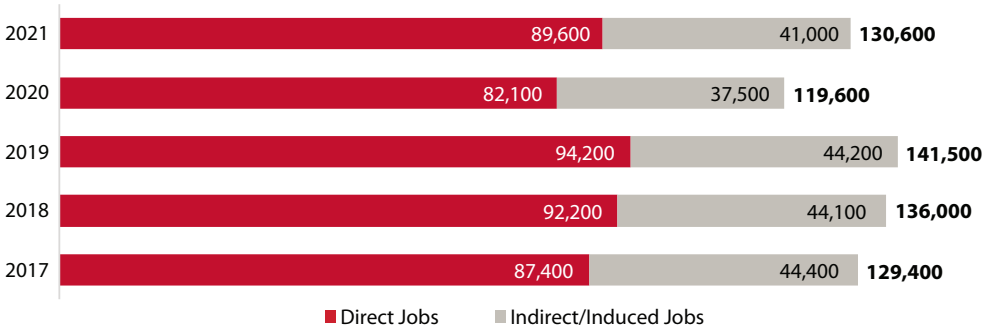


Source: Kem C. Gardner Policy Institute analysis of National Park Service and Ski Utah data

# Travel and Tourism-Related Employment

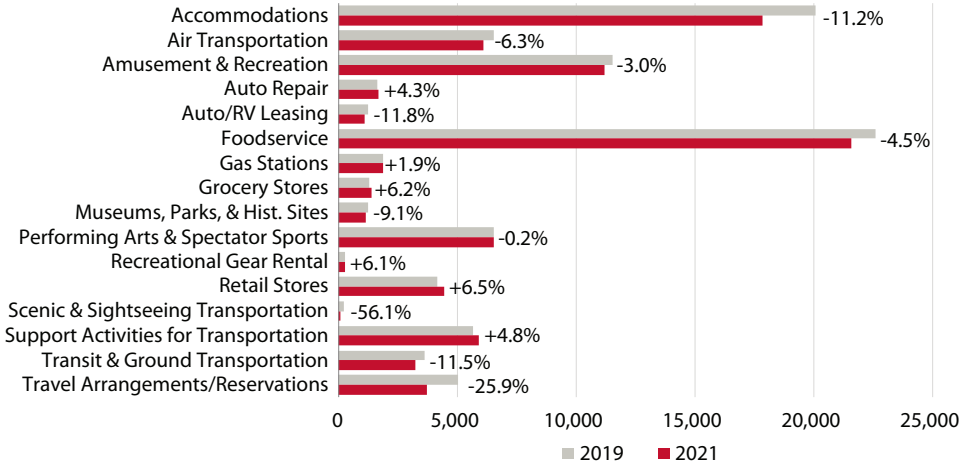
In 2021, the \$10.56 billion in direct visitor spending generated 89,600 direct jobs and supported around 41,000 additional indirect and induced jobs, summing to 130,600 total jobs statewide (up 9.2% from 2020, but still down 5.2% from 2019). In 2021, the three tourism-related sectors that rebounded the fastest from 2020 were retail (6.5%), grocery stores (6.2%), and recreational gear rental (6.1%). The transportation support and retail sectors reported the greatest increases above 2019 (each adding around 270 jobs), followed by grocery stores, which added around 80 jobs statewide. Conversely, accommodations jobs were still down from baseline 2019 (-2,200 jobs), followed by travel arrangements and reservations (-1,300 jobs), and foodservice (-1,000 jobs).

## Total Travel and Tourism-Supported Jobs, 2017-2021



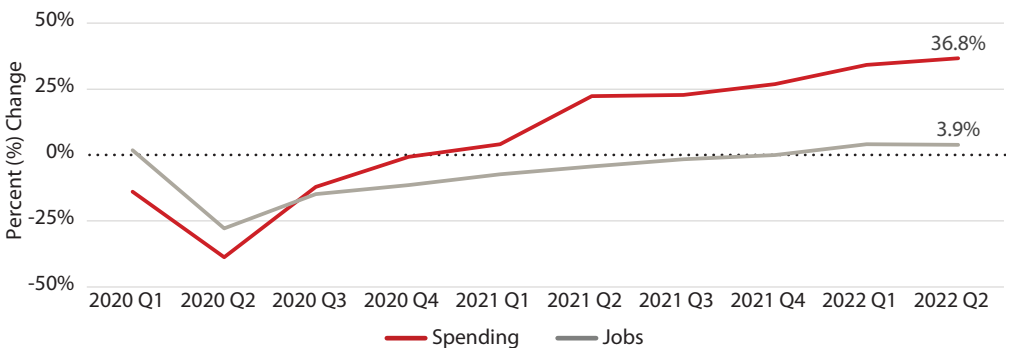
Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics and Tourism Economics data

## Direct Travel & Tourism Jobs, 2019 and 2021



Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics data

## Change in Hotel & Restaurant Spending and Jobs Compared With 2019 Baseline



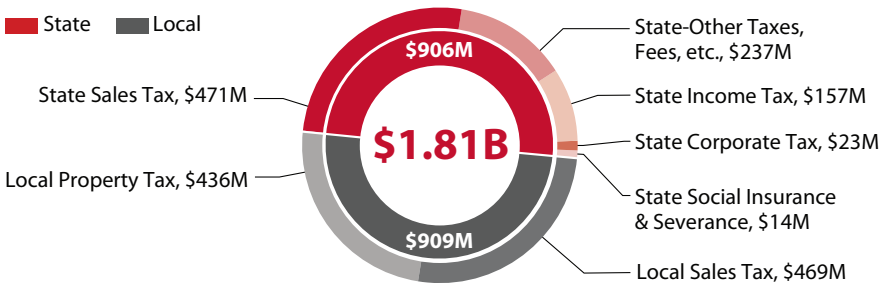
Source: Kem C. Gardner Policy Institute analysis of Utah State Tax Commission and U.S. Bureau of Labor Statistics data

# Tax Revenue

In 2021, the \$10.56 billion in direct visitor spending, which led to \$19.68 billion in total visitor-related spending when combined with indirect and induced spending effects, generated an estimated \$1.81 billion in total state and local tax revenue. This represents a 55.9% increase from 2020 and a 27.9% increase from 2019. Year-over tax revenue percentage increases are greater than visitor spending increases due to newly enacted and/or increased tax rates, as well as improved collections in income tax and property tax revenue.

Based on data through October 2022, the tourism-related tax revenue forecast for 2022 is positive. When comparing county transient room tax revenue for the first ten months of 2022 to the same time period in 2021, every county except for Daggett, Grand, Iron, Piute, and Wayne have experienced positive revenue growth. In fact, during the first ten months of 2022, Salt Lake County had collected an additional \$6.8 million, Summit County an additional \$4.0 million, and Utah County an additional \$1.1 million above the collected amounts for the same time period of 2021.

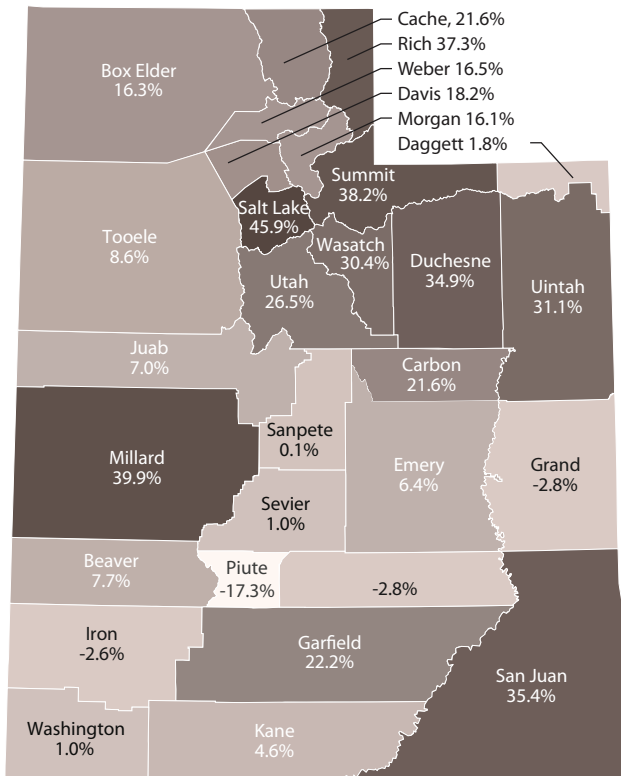
## Total Travel and Tourism-Generated Tax Revenue by Tax Type, 2021



Note: Includes economic multiplier effects.

Source: Kem C. Gardner Policy Institute analysis of Tourism Economics and Utah Tax Commission data

## Year-over Change in County Transient Room Tax Revenue by County, 2022



## Year-over County Transient Room Tax Revenue Gains, Top Ten Counties, 2022

Salt Lake	\$6,778,041
Summit	\$3,970,958
Utah	\$1,087,399
Wasatch	\$731,070
Garfield	\$470,340
San Juan	\$337,820
Weber	\$323,194
Davis	\$318,075
Rich	\$287,038
Cache	\$232,864
Kane	\$220,313

Note: county transient room tax revenue includes January through October data.  
Source: Kem C. Gardner Policy Institute analysis of Utah State Tax Commission data

Note: county transient room tax revenue includes January through October data for 2021 and 2022..

Source: Kem C. Gardner Policy Institute analysis of Utah State Tax Commission data

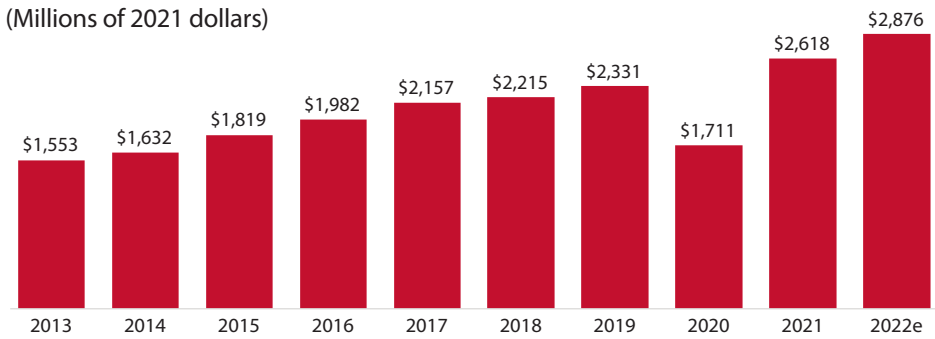
# Accommodations

**T**axable accommodation sales include room charges as well as other lodging-related purchases that were un-taxed at point of sale (e.g., a hotel purchasing tax-free furniture). In 2021, Utah accommodation sales were \$2.6 billion, a 53.0% year-over increase and up 12.3% from 2019 when adjusted for inflation. Accommodation sales are estimated to increase another 10.0% in 2022.

The average annual statewide hotel occupancy rate in 2021 (61.8%) was up from the 2020 average of 46.7%. Statewide occupancy rose to its highest point of 76.8% in July, which was still below July occupancy during baseline year 2019 (79.8%). Average daily hotel room rates (ADRs) and revenue per available room (RevPAR), however, were up 3.9% and 2.3%, respectively, from 2019 baseline. The upward trend in statewide occupancy, ADR, and RevPAR has continued into 2022.

## Taxable Accommodations Sales, 2013-2022e

(Millions of 2021 dollars)



Note: e=estimate  
Source: Kem C. Gardner Policy Institute analysis of Utah State Tax Commission data

## Percent Change in Average Daily Room Rates by Select Counties, 2021-2022

County	2021	2022	2021-2022
Garfield-San Juan-Wayne	\$132.65	\$149.72	12.9%
Grand	\$176.51	\$186.88	5.9%
Kane	\$235.43	\$252.04	7.1%
Salt Lake	\$100.30	\$128.95	28.6%
Summit	\$279.37	\$336.78	20.5%
Wasatch	\$258.54	\$309.65	19.8%
Washington	\$134.81	\$141.72	5.1%

Note: ADR data includes January through November of each year.  
Source: Kem C. Gardner Policy Institute analysis of STR, Inc. data  
Republication or other re-use of this data without the express written permission of STR is strictly prohibited.

## Utah Hotel and Short Term Rental Occupancy Rates, 2019-2022



Source: Kem C. Gardner Policy Institute analysis of STR, Inc. and Transparent data  
Republication or other re-use of this data without the express written permission of STR is strictly prohibited.

Statewide Indicators	2020	2021	Change 2020–2021
Utah Population (Kem C. Gardner Policy Institute)	3,284,823	3,343,518	1.8%
Employment, All Industries <sup>1</sup> (Private Sector)	1,290,438	1,339,044	3.8%
Wages, All Industries <sup>2</sup> (Private Sector)	\$70,330	\$75,656	7.6%

### Spending, Employment, and Wages (Dollar Amounts in Millions)

Estimated Traveler Spending	\$7,065	\$10,562	49.5%
Total Tourism-Related Employment <sup>3</sup>	119,600	136,900	14.5%
Total Tourism-Related Wages <sup>3</sup>	\$4,446	\$5,224	17.5%
Direct Leisure & Hospitality Employment (Private Sector)	133,472	148,317	11.1%
Direct Leisure & Hospitality Wages (Private Sector)	\$2,880	\$4,430	53.8%
Leisure & Hospitality Share of Total Employment (Private Sector)	10.3%	11.1%	7.5%
Total Leisure & Hospitality Taxable Sales	\$7,369	\$10,252	39.1%

### Utah Accommodations Industry

Hotel/Motel Occupancy Rates <sup>4</sup>	46.7%	61.8%	32.3%
Hotel/Motel Average Daily Rate <sup>4</sup>	\$104.41	\$128.97	23.5%
Hotel/Motel Revenue Per Available Room <sup>4</sup>	\$50.33	\$80.08	59.1%
Short Term Rental Occupancy Rates <sup>5</sup>	45.0%	55.3%	22.9%
Short Term Rental Listings	18,628	18,924	1.6%
Accommodations Industry Employment (Private)	16,987	18,622	9.6%
Accommodations Industry Wages (Private, Millions)	\$471	\$575	22.1%
Accommodations Taxable Sales (Millions)	\$1,627	\$2,618	60.9%

### Tourism-Related Tax Revenues (Dollar Amounts in Millions; Fiscal Year)

Total TRCC Tax Revenue	\$76.8	\$76.8	0.0%
Total TRT Tax Revenue (County & Municipality)	\$77.0	\$80.4	4.4%
Total Statewide Motor Vehicle Rental Tax	\$6.1	\$5.3	-13.1%
Total Resort Communities Sales Tax	\$28.0	\$33.4	19.3%

### Statewide Visitation Counts

Utah Skier Visits	5,301,766	5,829,679	10.0%
Total National Park Recreation Visits	7,768,944	11,268,247	45.0%
Arches National Park	1,238,083	1,806,865	45.9%
Bryce Canyon National Park	1,464,655	2,104,600	43.7%
Canyonlands National Park	493,914	911,594	84.6%
Capitol Reef National Park	981,038	1,405,353	43.3%
Zion National Park	3,591,254	5,039,835	40.3%
Total National Place Recreation Visits <sup>6</sup>	4,844,196	5,926,745	22.3%
Total Utah State Park Recreation Visits (FY)	10,597,513	11,636,456	9.8%
Salt Lake International Airport – Total Passengers	12,559,026	22,378,989	78.2%

1 Employment includes annual average employee full- and part-time private jobs (does not include sole proprietors).

2 Wages includes annual average full- and part-time employee wages (does not include sole proprietors).

3 Consists of direct, indirect, and induced jobs and wages; includes full- and part-time private and public jobs, and includes sole proprietors.

4 Kem C. Gardner Policy Institute analysis of STR, Inc., data; REPUBLICATION OR OTHER RE-USE OF THIS DATA WITHOUT THE EXPRESS WRITTEN PERMISSION OF STR IS STRICTLY PROHIBITED.

5 Short term rental subtypes “Bed & Breakfast,” “Dorm,” and “Other” have been omitted.

6 Visitation data for Flaming Gorge NRA and Bears Ears NM are not included.

Sources: Kem C. Gardner Policy Institute, U.S. Travel Association, Utah Department of Workforce Services, STR, Inc., Bureau of Land Management, Utah State Tax Commission, Utah State Parks, Ski Utah, National Park Service, Utah Office of Tourism, S.L.C. International Airport, Tourism Economics, and Transparent.